CHAPTER 3: DEMAND FOR OUTDOOR RECREATION FACILITIES

This chapter summarizes the "demand" for outdoor recreation facilities in Montana, based on a number of consumer studies and data that are described herein. The "demand" refers to the level of resident and nonresident need or desire for outdoor recreation facilities, services and programs. A 1999-2000 National Survey on Recreation & the Environment (NSRE) was conducted by the USDA Forest Service and the University of Tennessee, and found that "outdoor recreation is still a basic part of the American lifestyle: traditional land, water, snow and ice settings are still very much in demand as places for casual activities such as walking, picnicking, family gatherings, sightseeing and visiting nature centers or nature trails." The results of consumer research in Montana contained in this chapter are consistent with the national research.

This chapter is organized into eight sections:

3.1 Methodology for Measuring Demand
3.2 Overview of Resident & Nonresident Market Demographics
3.3 BRFSS Survey of Resident Outdoor Recreation Habits & Needs
3.4 ITRR Resident & Nonresident Recreation Study Results
3.5 Comparison of BRFSS, ITRR & Recreation Provider Results
3.6 National Recreation Trends
3.7 Summary & Implications

Chapter 3:

Demand for Outdoor Recreation Facilities

- Methodology
- Overview of Resident & Nonresident Consumers
- BRFSS Results
- ITRR Resident Studies
- ITRR Nonresident Data
- National Recreation Trends & Implications
- Summary & Implications

3.1 Methodology for Measuring Demand

The planning team used several recent consumer studies and data trends to assess demand for outdoor recreation facilities. The key studies were the Behavioral Risk Factor Surveillance System (BRFSS) survey sponsored by the Centers for Disease Control (CDC) and Montana Department of Public Health & Human Services (DPHHS); the Montana Resident 1998-1999 Pleasure Travel Survey; the 1999 Report of Recreation Participation Patterns by Montana Residents; and the 2000-2001 Nonresident Visitor Study, all of which were conducted by the University of Montana Institute for Tourism & Recreation Research (ITRR). Additionally, the planning team reviewed resident and nonresident recreation licensing data trends from Montana Fish, Wildlife & Parks and Motor Vehicle Division (MVD), and national recreation research from the Travel Industry Association of America (TIA), American Recreation Coalition (ARC), America Outdoors (AO) and the NSRE.

Demand, *n.* An urgent or pressing requirement. The desire and means to purchase goods. The amount of goods purchased at a specific price. The state of being sought for purchase or use.

BRFSS: In 2002, Montana State Parks formed a partnership with the Cardiovascular Health Program of the Montana Department of Public Health & Human Services. Together, the departments requested inclusion in Montana's annual BRFSS survey from the CDC. Nationally, BRFSS is the single largest telephone survey in the world, and has been collecting and reporting national health behavior data since 1984. Various modules, such as Alcohol Consumption, Cholesterol Awareness, Tobacco Use, and Health Care Access, make up the core of BRFSS. These data are reported to the CDC each year and become part of the national health database.

Every state must provide the core questions to be included in this ongoing data collection effort; however, states may choose to add a module of state-specific questions. Montana State Parks worked with DPHHS to create an outdoor recreation module for Montana. This module, the first of its kind nationally, was deemed suitable by the Montana BRFSS Working Group for inclusion in the 2002 survey. The data collected were used to evaluate outdoor recreation facility demand for this Statewide Comprehensive Outdoor Recreation Plan (SCORP). The planning team obtained the BRFSS data set from the CDC contractor, created a custom algorithm to weight the data according to CDC standards, and analyzed the data for inclusion in the SCORP (see section 3.3). By the end of December 2002, 4,036 Montanans had participated in the BRFSS survey. Only adults age 18 and over were interviewed, and the questions asked related to their personal recreation habits and needs, so outdoor recreation information about youth is not represented in the BRFSS data.

TIA, ITRR & BBER: The Tourism Industry Association (TIA) conducts ongoing national tourism research, which is monitored by the planning team for comparison with Montana tourism research. In 1998-1999, the Institute for Tourism & Recreation Research (ITRR) at the University of Montana conducted a year-long resident recreation and leisure travel study, followed by a statewide nonresident travel study in 2000-2001. In 1995, ITRR completed a statewide Trail Users Study, and the Bureau of Business & Economic Research (BBER) at the UM conducted a study on Snowmobiling in Montana in 2002. These studies provided data to the planning team about primary recreational activities, trends and demand of both Montanans and nonresident visitors on a seasonal and year-round basis.

Unfortunately, the BRFSS, BBER and ITRR studies were conducted at different times and for different purposes, so it is not possible to make direct comparisons between the data collected. However, it is possible to compare the relative levels of various outdoor recreation activities, and in the case of the ITRR studies, to identify changing trends from previous studies. The BRFSS outdoor recreation module was limited (by CDC) to eight questions, which were determined prior to the involvement of the SCORP planning team. Therefore, the scope of the data collected is narrow; however, the quantity of questionnaires completed is extensive, so the results are representative of Montana's adult population at large.

FWP & MVD: The planning team also reviewed Montana resident and nonresident conservation, hunting and fishing license/tag/permit trends from 1990 to 2002, based on data from Montana Fish, Wildlife & Parks, and resident and nonresident recreational motor vehicle registration trends (OHV, snowmobile and boat) from 1990 to 2002, based on data from Montana Motor Vehicle Division (MVD).

3.2 Overview of Resident & Nonresident Market Demographics

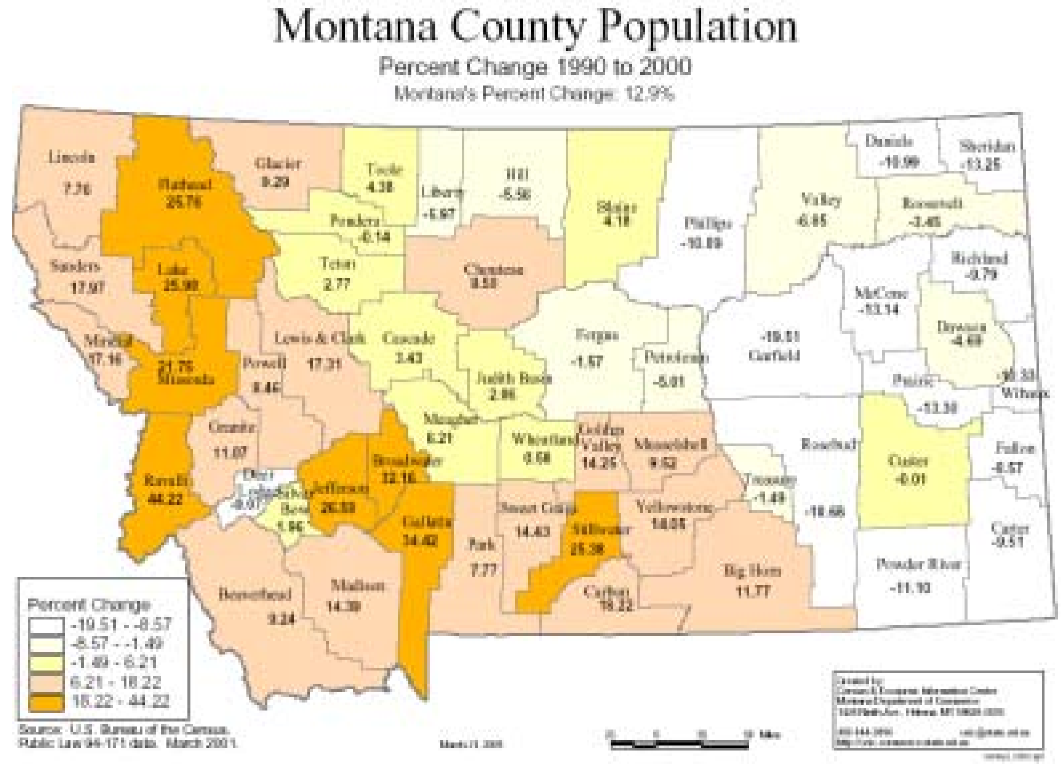
Montana's population grew by 13% from 1990 to 2000, and is expected to top 1 million by 2010. It is the 4th oldest population in the nation.

Montana's population grew by 13% from 799,065 in 1990 to 902,195 in 2000, and is expected to top one million citizens by 2010. Moreover, Montana hosted 9.6 million nonresident visitors to the state in 2001 (ten times the state population). This section provides demographic information about both Montana residents and nonresident visitors, as context for the recreation demand data presented in the subsequent sections.

Characteristics of Montanans, and Changes Since 1990

According to the 2000 U.S. census, Montana is home to 902,195 citizens, which is an increase of 103,130 since 1990. Most of the growth took place in western and south central Montana counties, while most of eastern Montana's counties lost population over the decade (Figure 3.1). While eight of Montana's fifty-six counties saw population growth of more than 20% from 1990 to 2000, twenty-two counties actually were de-populating. The implications are increased demand for recreation facilities in high growth areas, and decreased ability to pay for existing facilities in areas that have lost residents (taxpayers).

Figure 3.1



In 2000, the median age in Montana was 37.5, compared to the nationwide median age of 35.3. Montana has the fourth oldest population in the U.S. As Table 3.1 shows, Montana's population of 20-44 year olds is 3.3% lower than the national average, and the state's population of residents age 45 and older is higher than the national average (37.8% versus 34.4%). Montana loses many of its young adults after they graduate from high school or college because of a lack of jobs, and many new residents are couples moving to Montana to retire. Montana also is seeing the effects of the aging Baby Boomers and people living longer: the number of residents age 45 to 54 grew by 64.1% from 1990 to 2000, the number of residents age 55 to 59 grew by 38.7%, and the number of people age 85 and older grew by 43.7%. Figure 3.2 on the next page shows the percentages of county population over age 65 in 1997 and 2025 (projected). The dark shaded areas indicate the counties where 18% or more of the residents are over age 65. In other words, nearly one-in-five Montanans will be age 65+ in all but seven counties by 2025. As the population ages, there is likely to be more demand for less-strenuous activities like walking, golf, fishing, and picnicking.

The average Montana household size in 2000 was 2.45 people (vs. 2.59 nationally). One-third (33.3%) of Montana households have children under age 18, and 23% are married couples with children, while the remaining 10.3% are single parent homes or non-family households (unrelated people living together). About one-third of households (30.6%) are married couples with no children (or no children at home). Nearly one-quarter (23.4%) of households have someone age 65 or older, and in 10% of households, that person lives alone. Nine in ten Montanans (90.6%) are white, while 6.2% are American Indian and the remaining 3.2% are Black, Asian, Pacific Islander, some other race or a mixture of races.

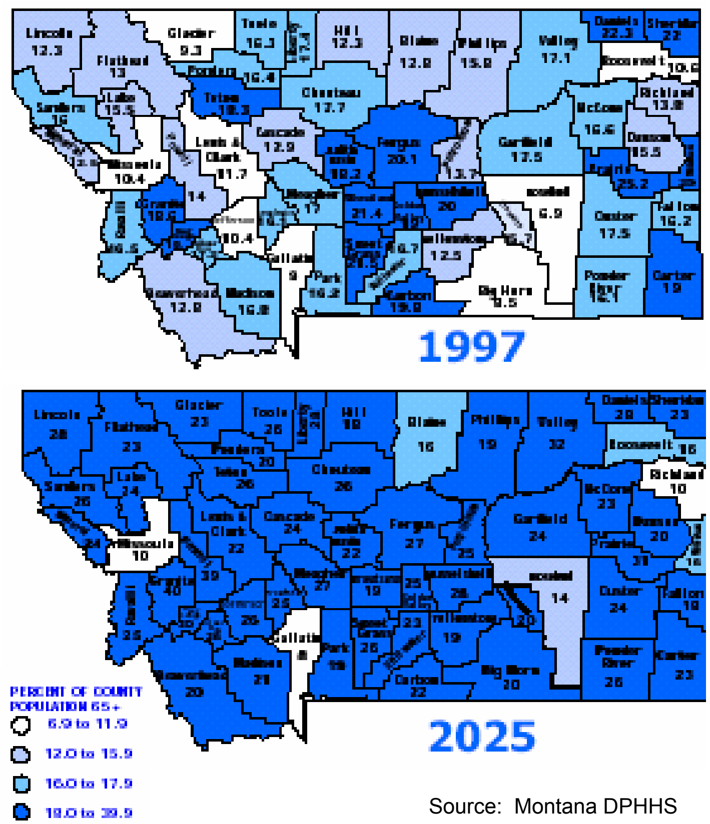
Table 3.1

Montana vs. U.S. Population in 2000

Age	MT %	Group %	U.S. %	Group %	Diff (MT-US)
<5	6.1		6.8		
5-9	6.9		7.3		
10-14	7.7		7.3		
15-19	7.9	28.6	7.2	28.6	0.0
20-24	6.5		6.7		
25-34	11.4		14.2		
35-44	15.7	33.6	16.0	36.9	-3.3
45-54	15.0		13.4		
55-59	5.2		4.8		
60-64	4.2	24.4	3.8	22.0	2.4
65-74	6.9		6.5		
75-84	4.8		4.4		
85+	1.7	13.4	1.5	12.4	1.0

Source: U.S. Bureau of Census

Figure 3.2
Percent of County Population Age 65+



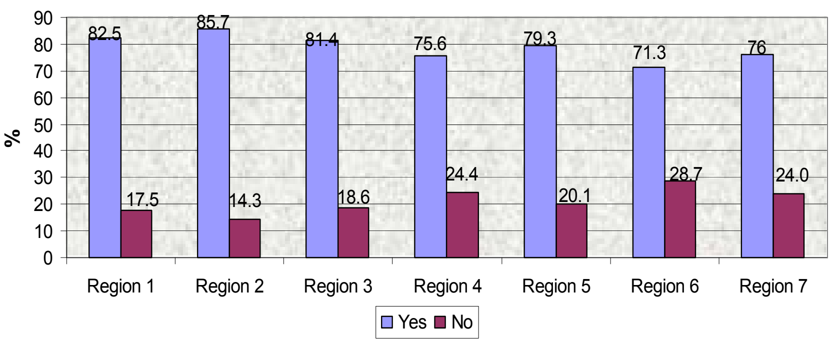
Source: Montana DPHHS

Montana's median household income is $33,024 statewide, but it is less than $30,000 in 29 of the 56 counties (and less than $25,000 in Petroleum, Wheatland and Roosevelt Counties). The median household income exceeds $35,000 in Rosebud, Yellowstone, Lewis & Clark, Gallatin, Stillwater and Jefferson Counties. In 1999, 14.6% of Montana's population lived in poverty. In eleven counties, the number of people in poverty exceeded 20% of the population (Wheatland, Golden Valley, Big Horn, Petroleum, Garfield, Judith Basin, Chouteau, Liberty, Glacier, Blaine and Roosevelt). The poverty rate was less than 10% in only two counties (Jefferson and Stillwater).

Fifty years ago, Montana had one of the highest per capita income rates in the nation, and now it has one of the lowest at $17,151, which is 58% below the national average. This trend is due mainly to declines in resource-based industries, which historically provided family-wage jobs (mining, forestry, agriculture, ranching, manufacturing). Those jobs have not been replaced by other industries providing family-wage jobs to the same workforce. While there has been growth in the government, services, retail, wholesale, construction, communications, and public utilities sectors, many jobs in the highest growth sectors are low-paying jobs (e.g., retail, services). Moreover, education and workforce training/re-training programs have not kept up with economic changes.

As part of the general health section in the BRFSS survey, participants were asked the following question: "During the past month, other than your regular job, did you participate in any physical activities or exercises, such as running, calisthenics, golf, gardening or walking for exercise?" Overall, 80.3% of Montanans answered "Yes", and 19.6% answered No. Figure 3.3 shows the results of the question in each FWP region of the state. According to University of Montana research, Montanans take more leisure trips than the U.S. average. Some residents appear to be willing to accept lower wages as a trade-off for quality of life: living in Montana, they have more opportunities for outdoor recreation.

Figure 3.3: BRFSS Survey Results 2002
Physical Activity/Exercise Participation in Past Month, by FWP Region



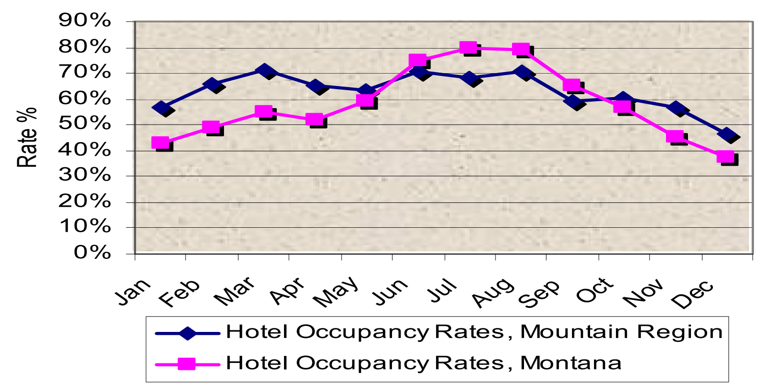
The implications of the demographic data about Montanans are that outdoor recreation managers need to focus not only on facilities and programs for youth (29% of the population) and young adults (34% of the population), but increasingly for mature adults (38% of the population and growing). Because of Montana's struggling economy and low income population, affordability of outdoor recreation is a key issue, as is the limited ability of businesses and citizens to pay higher taxes for it. This is one area where tourism benefits Montana: nonresidents help pay for outdoor recreation facilities and programs, as described in the next section. However, nonresidents' contribution to funding Montana services and facilities is not being maximized because taxes and fees charged to nonresidents are lower than in many other states.

Characteristics of Montana's Nonresident Visitors

In 2001, Montana hosted 9.6 million nonresident visitors – a 46% increase from 6.5 million visitors in 1990 – and they spent $1.7 billion in the state. About 59% (5.7 million) of the visitors came during the summer (June-September), about 20% (1.9 million) came in winter (December-March), about 12% (1.1 million) came in spring (April-May) and 9% (995,502) came in fall (October-November).

During the same time period, hotel lodging sales increased by 85%, but after an adjustment for inflation, the real dollar growth rate was about 41% (half of the growth in gross sales was due to inflation – price increases – rather than growth in volume). Tourism in Montana is very seasonal: hotel occupancies average 75% or more in peak season (July-September), but they drop below 50% (or lower) for six months of the year – which is below break-even point for most hotel businesses (Figure 3.4).

Figure 3.4: Montana Average Hotel Occupancy, 2001



Source: Smith Travel Research

Montana's nonresident visitors came primarily from neighboring states and Canadian provinces, California and the Midwest (Figure 3.5). Table 3.2 on the next page provides details about the origins of the travelers by season.

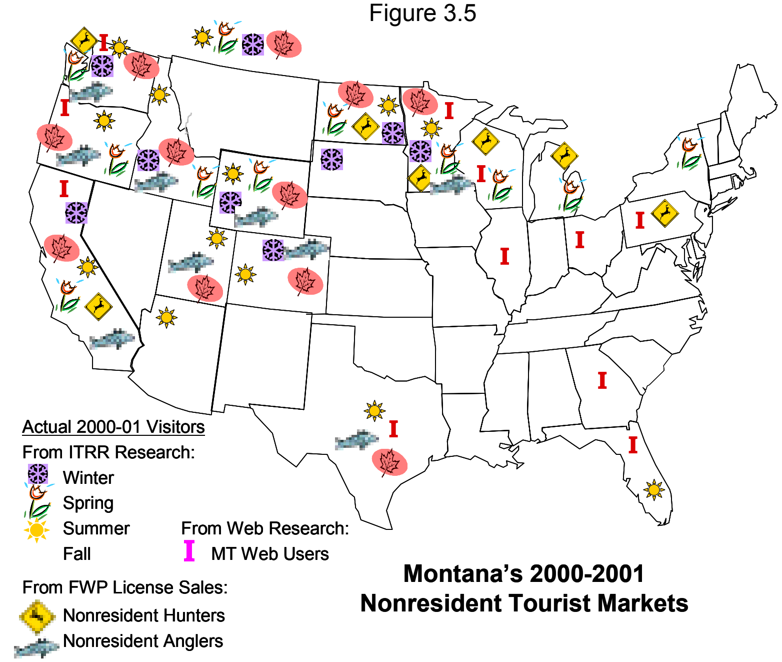
The top ten states of origin and the number of travel *groups* from each were:

Washington	466,000	Alberta, CAN	206,000
North Dakota	354,000	Minnesota	204,000
California	306,000	Colorado	163,000
Wyoming	297,000	Oregon	155,000
Idaho	261,000	Utah	124,000

The characteristics of the travelers by season were the following:

In winter, the average travel party size was 2.4 people who spent $111 per day, stayed 3.1 nights and had a household income of $60,000-$80,000 (more than twice the average household income of Montanans). Most were repeat visitors, and two-thirds were couples or singles – only 18% were traveling with children (most of those were just passing through). Nearly 40% came from North Dakota and Wyoming – many of them skiers, snowmobilers or day trip visitors coming to shop in Billings. About one-third of winter visitors were just passing through Montana on the way to somewhere else, 23% were vacationing in Montana, 18% were traveling for business reasons, and 16% were visiting friends or relatives in Montana (many of them for the holidays).

Figure 3.5



In spring, the average travel party size was 2 people who spent $96 per day, stayed 3 nights and was less affluent than the winter visitor (average income of $40-60,000).

Table 3.2: Origin of 2001 Nonresident Visitors

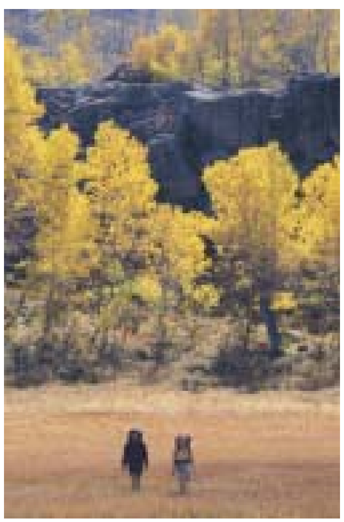
Place of Residence	Winter Dec-Mar	Spring Apr-May	Summer Jun-Sept	Fall Oct-Nov
Total # of Grps	801,562	579,300	2,267,140	432,827
Alberta, CAN	**7%**	**5%**	4%	**7%**
Arizona	2%	<1%	3%	0%
British Columbia	2%	2%	2%	0%
California	3%	**5%**	**10%**	**6%**
Colorado	**6%**	2%	4%	3%
Florida	<1%	<1%	3%	0%
Idaho	3%	**10%**	**6%**	**10%**
Michigan	<1%	4%	2%	2%
Minnesota	**5%**	**5%**	**5%**	**5%**
New York	<1%	4%	2%	0%
North Dakota	**22%**	**9%**	4%	**8%**
Oregon	3%	4%	4%	4%
Saskatchewan	3%	<1%	1%	0%
South Dakota	3%	2%	1%	0%
Texas	3%	2%	3%	3%
Utah	<1%	2%	4%	5%
Washington	**8%**	**12%**	**12%**	**14%**
Wisconsin	<1%	**8%**	2%	0%
Wyoming	**17%**	**7%**	4%	**7%**
Other Western	<1%	4%	**5%**	2%
Other MW/East	2+%	2+%	**18+%**	2%
Overseas	<1%	<1%	3%	0%

Source: ITRR Nonresident Visitor Study Reports 2001-7, 2002-2/5/8

Most were couples or singles – only 10% were traveling with children, and most of those were visiting friends or relatives. In contrast to winter, only 16% came from North Dakota and Wyoming, while 22% came from Washington and Idaho, nearly 20% from the Midwest, and 5% from California. Nearly half of spring travelers were just passing through, while one-quarter were vacationing, 14% were visiting friends or relatives and 11% were business travelers.

In summer, the average group consisted of 2.5 people (larger than in winter or spring), spent $110 per day, stayed 4.2 nights (longer than winter or spring), had a household income of $40-$60,000, and most had been to Montana before. More than half (55%) were couples or singles, though 41% were couples, and one-quarter were traveling with children (fewer than in 1996). More than 25% came from Washington, Idaho, Wyoming and the Dakotas, while 13% came from other nearby states (UT, OR, CO, NV), 10% from California, 17% from the Midwest, 15% from the East and Southeast, 8% from Canada, 8% from the Southwest (AZ, TX, NM, OK), and 3% from overseas. Half of summer travelers were destination vacationers to Montana, while 21% were just passing through, 15% were visiting friends or relatives and 7% were business travelers.

In fall, the average group consisted of 2.03 people, stayed 3.94 nights, and slightly more than half had incomes of less than $60,000, although one-quarter of all fall travelers, and 39% of vacationers, earned $100,000+ (more than any other season, and likely due to nonresident big game hunters traveling to Montana). More than 40% of fall groups were couples, one-quarter were singles and 21% were families (10% with children). Fall visitors originated from Washington (14%), Idaho (10%), North Dakota (8%), Wyoming and Alberta (7% each), California (6%), the Midwest, Utah, Oregon, Colorado, Texas, Nevada and Pennsylvania. By comparison, the top states of origin for big game hunters according to Montana FWP are WA, ND, CA, MN, WI, PA, MI, TX, OR, NY, FL and OH. One-third of fall travelers were merely passing through, 29% were vacationing in Montana, one-quarter were visiting friends or relatives and 7% were business travelers.



In every season, the most affluent travelers were business travelers, followed by destination vacationers. The least affluent were the travelers who were visiting friends or relatives in Montana. According to a 1995 study by the American Travel Survey about destination travelers to Montana from Washington, California, Idaho and Wyoming, there were clear differences between travelers from different states. California travelers were primarily destination vacationers, much more affluent and educated than average (60% had some college), preferred to fly rather than drive, and most did not bring children. About one-quarter of them came in winter (presumably destination skiers) and most stayed in hotels and resorts (versus staying with friends or family in Montana). Many Idahoans were business travelers, while most Wyoming travelers were older day trip visitors (one-third were over 50). Many Washingtonians were college students, or destination skiers, but most were visiting family or friends in Montana.

An awareness of the socio-demographic characteristics of Montana residents and nonresident visitors is necessary to assist in the evaluation of current and future demand for outdoor recreation facilities. The next sections (3.3 through 3.5) further evaluate current demand for outdoor recreation facilities in Montana.

3.3 BRFSS Survey of Resident Outdoor Recreation Habits & Needs

In order to assess consumer demand for outdoor recreation facilities in Montana, the Montana Dept. of Health & Human Services (DPHHS) assisted Montana State Parks in developing an outdoor recreation module in the Behavioral Risk Factor Surveillance System (BRFSS) survey consisting of the following eight questions:

1. What was the PRIMARY outdoor recreational activity you participated in during the past 12 months?
2. How often did you participate in this outdoor activity in the past 12 months?
3. Are there any outdoor recreational activities you would like to have participated in during the past twelve months, but did not?
4. What is the TOP outdoor recreational activity you would like to have participated in during the past 12 months, but did not?
5. What was the PRIMARY reason you were not able to participate in this activity?
6. Which ONE type of outdoor recreational activity in YOUR COUNTY do you feel is in the greatest need of additional facilities or sites?
7. What do you think is the single MOST important outdoor recreational issue or concern facing YOUR COUNTY today?
8. Sometimes people with a physical disability are prevented from participating in an outdoor recreational activity because of conditions such as lack of facilities, facilities in violation of the Americans with Disabilities Act, or lack of transportation. Has this happened to YOU in Montana in the last 5 years?

BRFSS surveys were conducted from January to December 2002. A total of 4,036 surveys were completed, an average of 336 surveys per month (range = 260 to 450), comprising a very robust data set. The planning team obtained a mid-year data set (January-July data) in August 2002, and a final data set (January-December) in January 2003. An analysis of the mid-year data set was used to help develop many of the recommendations identified within this draft SCORP document, and the final data set was used to confirm the earlier analyses, conclusions, and recommendations.

FWP considers the BRFSS survey to be invaluable in the development of this new SCORP. Nevertheless, all survey instruments have limitations, and it is important for readers to understand the nature of the data collected by the BRFSS outdoor recreation module. BRFSS asked about the respondent's primary recreation activity, not all activities in which the respondent participates. Similarly, the survey asked for one type of facility in Question 6, and one issue or concern in Question Seven. Respondents were asked about their personal recreation habits, not the habits of other people in their household, and only adults age 18 and over were represented in the data. Finally, there were quite a number of respondent answers that were scored to the "other" category, which (except for Question 6) provides no information helpful in assessing consumer demand. Despite these limitations, the BRFSS data is very useful for identifying key issues and trends. When taken in the context of other research about Montanans' recreation habits and preferences, it provides collaborating data on a number of key issues and needs.

Table 3.3: BRFSS Survev Results

Primary Outdoor Recreation Activity - Last 12 Months

Activity	#	%
Walking	445	19.4
Other activity	399	17.4
None	219	9.6
Fishing	156	6.8
Hunting	154	6.7
Golf	103	4.5
Camping	82	3.6
Horseback riding	74	3.2
Refused	64	2.8
Mountain biking	61	2.7
Bicycling - street	59	2.6
Basketball	51	2.2
Downhill skiing/snowboarding	47	2
Don't know/not sure	43	1.9
Backpacking	41	1.8
Swimming	41	1.8
Jogging	40	1.7
Boating-motorized	32	1.4
Boating-nonmotorized	24	1.1
OHV	24	1
Baseball/softball	22	1
Snowmobiling	19	0.8
Tennis	18	0.8
Football	14	0.6
XC Skiing	13	0.6
Soccer	11	0.5
Skateboarding/rollerblading	9	0.4
Picnicking	7	0.3
Volleyball	7	0.3
Rodeo	6	0.3
Ice skating	5	0.2
Playground activities	2	0.1
Sailing	1	0.1
Bird watching	1	0
Fitness course activities	0	0
	2,294	100.2

Primary Outdoor Recreation Activities of Montanans

Table 3.3 summarizes the primary outdoor recreational activities of Montanans during the past twelve months (responses to Question 1). Walking was the most frequently cited activity, which is consistent with national trends (see section 3.6), followed by fishing, hunting, golf, camping and horseback riding. The BRFSS study did not capture the respondents' answers in the "Other activity" category.

The BRFSS activity findings are important in the context of the facility inventory in the previous chapter which indicated needs for trails, fishing access sites, boat ramps and public hunting lands. Swimming appeared lower on the list in the BRFSS activity data than in the facility needs assessment, perhaps because youth age 17 and under were not included in the BRFSS survey.

Primary Recreation Activity Results by Region

Table 3.4 below compares the top twelve responses to Question 1 by Montana's FWP regions. As in the statewide results, walking, other activity and none topped the list in each region. Fishing and hunting are the next primary activities in regions 1, 2, 3, 4 and 6, while basketball and golf move up in regions 5 and 7. Camping appears in all seven regions, and horseback riding in all but region 5. However, some regional differences emerge further down the list. Downhill skiing appears in regions 1, 2 and 4, while swimming appears in regions 1 and 7. Motorized boating and street bicycling appear in regions 4-7, backpacking in regions 2 and 3, and mountain biking in regions 2, 3 and 5.

Note again that activities generally associated with children/youth (swimming, baseball, softball, football, soccer, skateboarding, playground activities) fall toward the lower part of the list because the survey did not specifically seek information about outdoor recreation habits and needs of youth.

Table 3.4: BRFSS Survey Results 2002

Primary Outdoor Recreation Activity by FWP Region

Region 1		Region 2		Region 3		Region 4		Region 5		Region 6		Region 7	
Activity	%	Activity	%	Activity	%	Activity	%	Activity	%	Activity	%	Activity	%
Other activity	17.6	Other activity	21.1	Other activity	23.5	Walking	21.1	Walking	20.5	Walking	20.6	Walking	25.0
Walking	17.6	Walking	19.1	Walking	17.7	None	14.4	None	14	None	19.0	Other activity	12.5
Fishing	7.7	Hunting	6.2	Fishing	9.3	Other activity	11.6	Other activity	11.3	Other activity	11.9	None	10.2
None	7.2	Mountain biking	6.0	None	7.5	Hunting	7.4	Basketball	6.2	Hunting	8.7	Golf	9.4
Hunting	6.9	Fishing	4.8	Hunting	7.0	Fishing	6.0	Golf	5.7	Fishing	6.3	Fishing	7.8
Golf	5.0	Horseback riding	4.8	Golf	3.3	Golf	5.6	Hunting	5.4	Refused	5.6	Hunting	6.3
Camping	4.4	None	4.1	Camping	3.0	Camping	5.6	Bicycling - street	4.9	Golf	4.8	Horseback riding	4.7
Swimming	4.1	Camping	3.6	Backpacking	2.8	Horseback riding	3.5	Boating - motorized	4.9	Basketball	2.4	Bicycling - street	3.1
Horseback riding	3.3	Refused	3.1	Horseback riding	2.6	Bicycling - street	3.5	Fishing	4.6	Camping	2.4	Boating - motorized	3.1
Refused	3.3	Downhill skiing	2.9	Jogging	2.5	Boating - motorized	3.5	Don't know/not sure	3.5	Horseback riding	2.4	Swimming	3.1
Downhill skiing	3.0	Backpacking	2.9	Mountain biking	2.1	Downhill skiing	2.8	Mountain biking	3.2	Bicycling - street	1.6	Refused	2.3
Basketball	2.5	Golf	2.4	Don't know/not sure	1.9	Boating - nonmotorized	2.5	Camping	3.0	Boating - motorized	1.6	Camping	2.3

Frequency of Outdoor Recreation Activities

Question 2 in the BRFSS Outdoor Recreation module asked participants how often they participated in their primary outdoor recreation activity during the past 12 months. The planning team converted the responses to a monthly frequency, then calculated frequency rates and means for each activity. Table 3.5 at right shows the list of participants' activities in order of most frequent participation to least frequent participation. It indicates that people who participate in certain types of activities tend to be avid participants (for example, bird watchers participate in bird watching an average of 28 times per month, ice skaters an average of 12 times per month, etc.). In this particular question, playground activities appear near the top of the list.

These data support findings about facility needs from the previous chapter, indicating that facilities such as parks and open space, playgrounds, trails (walking, XC skiing, biking, OHV), skate parks, swimming pools and ball fields are important facilities to serve Montanans who enjoy outdoor activities frequently. Activities that appear high on the list in Table 3.5 that were not listed near the top in Table 3.3 (page 38) were tennis, skateboarding and ice skating. Of those, only skateboarding was cited as a priority need among facility managers (to serve youth).

Table 3.6 below shows a frequency analysis of six key outdoor recreation activities, including the "Other Activity" category. The overall results about frequency of primary activity reveal some interesting trends:

- One-quarter of Montanans who walk outdoors do so 8-12 times monthly, one-third walk 16+ times
- 15% of Montanans who fish do so eight or more times per month
- More than 38% of Montanans who hunt do so four or more times per month
- 29% of Montanans who golf do so four to twelve times monthly; nearly 20% golf twelve or more times
- Of Montanans who participate in mountain or street biking, 57% do so more than eight times per month
- 47% of Montanans who play tennis do so 16+ times per month, while 53% play less than seven times
- 14% of Montanans who camp do so four to sixteen times per month; 86% camp less than four times
- 25% of Montanans whose activity involves off-highway vehicles (ATVs, 4x4s, motorcycles) participate 12+ times per month; 38% participate 4+ times per month
- 37% of Montanans who snowmobile do so four or more times per month
- Of the people who cited "Other Activity," the majority participated in that activity four times a month or less, while 23% of them participated more than twelve times per month.

Table 3.5: BRFSS Survey Results

Frequency of Activities (Times/Month)

Activity	Mean
Bird Watching	28.0
Playground Activities	16.6
Walking	13.6
Jogging	13.4
Tennis	12.3
Ice Skating	12.0
Skateboarding/Rollerblading	11.2
Bicycling - Street	9.7
XC Skiing	9.5
Mountain Biking	9.1
Swimming	9.0
Football	8.5
Soccer	8.5
Basketball	8.4
Other Activity Not Listed	8.1
Horseback Riding	7.7
Golf	7.4
Rodeo	6.5
Baseball/Softball	6.2
OHV (Off Highway Vehicles)	5.6
Hunting	5.4
Volleyball	5.3
Backpacking	4.6
Boating-Nonmotorized	4.5
Fishing	4.1
Sailing	4.0
Downhill Skiing/Snow Boarding	3.6
Snowmobiling	2.8
Camping	2.1
Boating-Motorized	2.0
Picnicking	0.6

Table 3.6: BRFSS Survey Results 2002

Frequency of Six Key Outdoor Recreation Activities

	Walking		Other Activities		Fishing		Hunting		Golf		Camping	
Times/Month	#	%	#	%	#	%	#	%	#	%	#	%
0.0 - 4.0	86	20.6	204	54.0	104	69.7	91	61.8	52	53.0	71	86.0
4.1 - 8.0	61	14.5	50	13.1	25	15.6	33	21.6	16	16.6	6	7.6
8.1 - 12.0	103	24.1	37	9.5	19	12.1	12	7.8	12	11.9	2	2.7
12.1 - 16.0	40	9.3	27	7.3	1	0.9	5	3.1	10	9.7	3	3.8
16.1 - 20.0	57	13.3	32	8.4	2	1.2	0	0.2	3	2.7	0	0.0
20.1+	77	18.2	29	7.7	1	0.7	8	5.7	6	6.1	0	0.0
Total	424	100	379	100	152	100.2	149	100.2	99	100	82	100.1

= Number of participants. % = Percent of participants in each frequency range.

Figure 3.6: BRFSS
Did Not Participate in Rec'n Activities in Past 12 Months, But Desired To

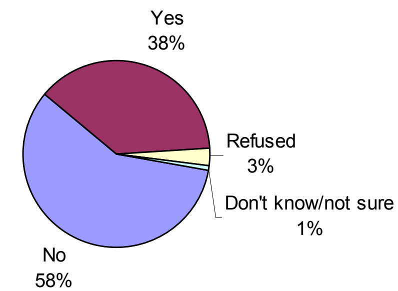


Table 3.7: BRFSS
Activity Unable to Participate In

Activity	#
Other activity not listed	160
Downhill skiing/snowboarding	92
Fishing	71
Don't know/not sure	50
Boating-nonmotorized	42
XC skiing	41
Hunting	38
Camping	36
Golf	35
Walking	34
Swimming	31
Bicycling - street	30
Jogging	28
Horseback riding	21
Backpacking	19
Baseball/softball	19
Mountain biking	19
OHV	15
Boating-motorized	13
Soccer	13
Tennis	9
Snowmobiling	9
Basketball	8
Windsurfing	6
Volleyball	5
None	4
Refused	4
Skateboarding/rollerblading	3
Fitness course activities	2
Picnicking	2
Football	2
Ice skating	2
Sailing	1
Rodeo	0
Total	864

Montanans Who Were Unable to Participate in Outdoor Recreation Activities

The third, fourth and fifth questions on the BRFSS outdoor recreation module asked participants if there were any outdoor recreation activities in which they would liked to have participated during the past twelve months, but did not – and if so, which activity and why. The majority of Montanans answered "No," but 38% said "Yes" (4% refused to answer or were not sure, Figure 3.6). Table 3.7 lists the activities mentioned most frequently as those which Montanans would like to have participated in, but did not. Besides "Other activity not listed," the most frequently cited activity was downhill skiing and snowboarding, followed by fishing, float boating, cross-country skiing, hunting, camping and golf.

Table 3.8 below shows the responses by FWP region; which varied widely. Region 2 had the highest percentage of residents who answered "Yes" – nearly half of them desired to participate in an activity, but did not. Of the activities named, downhill and cross-country skiing top the list, followed by fishing, golf and mountain biking. In regions 6 and 7, two-thirds of residents answered that there were no activities in which they desired to participate but were unable. Skiing or fishing top the list in all regions except region 4, where bicycling topped the list (but was not mentioned in the top seven activities in the other regions). Walking was high on the list in regions 4, 5 and 7, while cross-country skiing appeared in regions 2 and 3, and golf in regions 2, 5 and 6.

When asked about the primary reason they were not able to participate, more than one-third (36.1%) of the participants answered "Lack of time." Other reasons cited were "Physical disability" (10.9%), "Cost" (8.9%), "Lack of personal equipment" (4.4%), "Poor health" (4.0%), "Poor environment" (3.3%), "Lack of facilities" (2.9%), "Lack of participants" (2.6%), "Safety concerns" (2.0%) and "Lack of child care" (2.0%). The responses citing physical disability are noteworthy in the context of ADA access and an aging population. Cost and lack of equipment are not surprising answers in relationship to skiing and boating, particularly in the context of the income and poverty data presented earlier in this chapter.

Table 3.8: BRFSS Survey Results 2002
Did Not Participate, But Desired To, by Region

	Region 1		Region 2		Region 3		Region 4		Region 5		Region 6		Region 7	
	#	%	#	%	#	%	#	%	#	%	#	%	#	%
No	212	58.1	202	48.2	323	56.7	182	63.6	227	61.5	85	66.4	89	69.0
Yes	136	37.3	201	48.0	225	39.5	96	33.6	129	35.0	36	28.1	37	28.7
Refused	12	3.3	13	3.1	18	3.2	5	1.7	11	3.0	7	5.5	3	2.3
DK/NS	5	1.4	3	0.7	4	0.7	3	1.0	2	0.5				
TOTALS	365	100.1	419	100.0	570	100.1	286	99.9	369	100.0	128	100.0	129	100.0

Activity Not Participated In, by Region

Region 1		Region 2		Region 3		Region 4		Region 5		Region 6		Region 7	
	%		%		%		%		%		%		%
Other activity	22.2	Other activity	19.9	Other activity	18.7	Other activity	22.6	Other activity	11.8	Other activity	12.5	Other activity	20.0
Downhill skiing	12.6	DK/NS	12.4	Downhill skiing	15.6	Bicycling - street	10.8	Fishing	11.0	Fishing	12.5	Fishing	14.3
Fishing	8.9	Downhill skiing	8.5	Fishing	8.0	Walking	10.8	Walking	9.4	Golf	9.4	Walking	11.4
DK/NS	5.9	XC skiing	7.5	Hunting	6.7	Camping	8.6	Jogging	9.4	Baseball/softball	9.4	Swimming	8.6
Camping	5.9	Fishing	6.5	XC skiing	5.8	Downhill skiing	7.5	Downhill skiing	7.9	Camping	9.4	DK/NS	8.6
Hunting	4.4	Golf	5.0	Swimming	5.3	Boating-nonmot	5.4	Golf	6.3	Horseback riding	6.3	Downhill skiing	5.7
Soccer	4.4	Mtn biking	4.5	Camping	3.6	Boating-mot	5.4	Baseball/softball	6.3	Hunting	6.3	Camping	2.9

Outdoor Recreation Activities in Need of Additional Facilities or Sites

The sixth question in the BRFSS outdoor recreation module asked participants "Which one type of outdoor recreational activity in your county do you feel is in the greatest need of additional facilities or sites?" Table 3.9 summarizes the responses about top local facility needs statewide, and Table 3.10 summarizes the results by FWP region. Swimming tops the list statewide, followed by Other Activity (see top eight "Other" activity types responses below Table 3.9), then biking, fishing, walking, skateboarding, field sports, basketball and camping.

At the regional level, note that after "Don't know/not sure" and "None", swimming is at the top of the list in every region except Region 4, where it is second to soccer. Skateboarding, soccer, biking, fishing, walking, baseball, softball are other priority needs, according to Montanans.

There are striking similarities in the needs reported by BRFSS respondents, and those reported by recreation facility managers in the online survey. In both surveys, community-based recreation facilities for swimming, biking, walking, skateboarding and field games were ranked highly. Rural recreation facilities were needed for fishing, hiking, biking, boating and camping.

Table 3.10: BRFSS Survey Results 2002

Facility Needs by Region

Region 1	%	Region 2	%	Region 3	%	Region 4	%	Region 5	%	Region 6	%	Region 7	%
DK/not sure	29.4	DK/not sure	33.5	DK/not sure	38.3	DK/not sure	38.8	DK/not sure	40.9	DK/not sure	43.0	DK/not sure	38.8
None	15.1	None	16.2	None	12.5	None	9.8	Swimming	9.5	None	7.8	None	11.6
Swimming	11.0	Swimming	8.1	Swimming	8.4	Other activity	7.0	Bicycling-street	6.3	Swimming	6.3	Swimming	10.1
Skateboarding	6.3	Mountain biking	5.1	Other activity	4.6	Soccer	6.3	Basketball	6.3	Refused	6.3	Fishing	7.8
Other activity	5.8	Other activity	4.3	Fishing	3.5	Swimming	5.9	None	4.1	Walking	5.5	Refused	3.1
Bicycling-street	4.9	Baseball/softball	3.8	Bicycling-street	3.2	Baseball/softball	4.5	Walking	4.1	Fishing	5.5	Other activity	3.1
Refused	3.8	Refused	3.1	Skateboarding	3.0	Skateboarding	3.5	Mountain biking	3.5	Other activity	3.9	Boating-motorized	3.1
Mountain biking	3.3	Backpacking	2.4	Refused	2.8	Walking	3.5	Other activity	2.7	Mountain biking	3.1	Basketball	2.3
Walking	3.0	Ice skating	2.4	Walking	2.8	Camping	3.1	Refused	2.7	Golf	3.1	Soccer	2.3
Backpacking	2.5	Bicycling-street	2.1	Mountain biking	2.1	Refused	2.4	Soccer	2.5	Skateboarding	3.1	Baseball/softball	2.3

Table 3.9: BRFSS Survey Results 2002

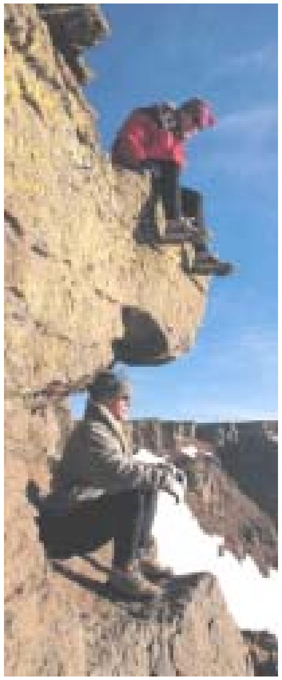
Facility Needs in Respondent's County

Facility Needs	# Respnd'ts
Swimming	197
Other activity	104
Refused	74
Bicycling-street	72
Mountain biking	68
Fishing	67
Walking	66
Skateboarding/rollerblading	64
Baseball/softball	48
Soccer	40
Basketball	37
Camping	36
Backpacking	35
Golf	33
Ice skating	31
Tennis	22
OHV	21
Boating-motorized	20
XC skiing	18
Playground activities	17
Downhill skiing/snowboarding	13
Hunting	12
Fitness course activities	12
Jogging	12
Snowmobiling	12
Boating-nonmotorized	11
Recreational shooting	9
Horseback riding	9
Rodeo	7
Football	6
Windsurfing	3
Volleyball	3
Picnicking	2
Sailing	2
Bird watching	1

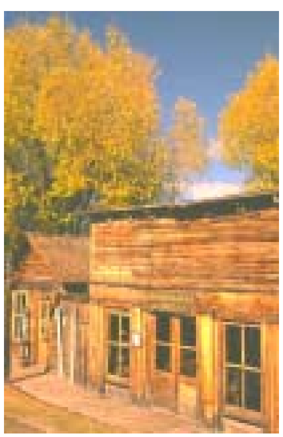
Top 8 "Other" Activity Types (weighted):

1. Trails: hiking, biking, walking (40)
2. Climbing: rock/mountain, climbing wall (18)
3. Skating rink: ice skating, hockey (15)
4. Youth/teen activities, playgrounds (13)
5. Water-related: water park, pool, raft/boating (12)
6. Parks: general, amusement, leashless (10)
7. Motorized: dirt bike, motor sports racing, motor complex (8)
8. Croquet (7)

Most Important Outdoor Recreation Issue or Concern Facing Montana Counties



Inadequate access to recreation and poor facility conditions are top priority issues.



The seventh question in the BRFSS outdoor recreation module asked participants what they think is the single most important outdoor recreational issue or concern facing their county today. Table 3.11 shows that, statewide, one-third of the participants did not know or were not sure. At the regional level, the answer "Don't know or not sure" was given by 27% to 47% of participants. Statewide, about one-quarter gave an answer that was not in the BRFSS list of answer categories (16% to 31% cited some other response at the regional level), and BRFSS did not capture the "Other" responses listed.

Beyond "don't know" and "other," all other responses garnered less than 10% of the participants statewide. Of those, need for facilities and inadequate access were top issues, followed by lack of funding. Poor facility conditions were mentioned by 3.1% of participants. A few cited conflict issues: inappropriate behavior of others (3.2%), congestion/crowding (3.1%), commercial use (1.9%) and nonresident use (.7%). The degree of these concerns varied by region. The need for facilities was cited by the highest percentage of participants in regions 2 and 5, and by the lowest percentage in region 4. Inadequate access was higher than the statewide average in regions 1 and 3, and funding was a concern mainly in regions 5 and 7. Conflict issues appeared more prominently in regions 2 and 3, but they were cited by 5% or fewer of participants.

From these responses, it does not appear that overcrowding, use by outfitters and their guests, or nonresident visitor use are major issues to most Montanans, but need for facilities and inadequate access do appear to concern 7-10% of residents in several regions. In regions 4-7, about half of participants did not list a specific issue or concern (they answered "Don't know," "None" or refused to answer). In regions 1-3, about 62-63% of participants did list a specific concern (though 25-31% of the responses were "Other"). This analysis indicates that outdoor recreation concerns are focused primarily in Montana's most populated regions – where high population growth has impacted residents' recreational experiences. In regions 4-7, the need for more facilities and funding were cited most.

Table 3.11: BRFSS Survey Results 2002

Single Most Important Outdoor Recreation Issue or Concern Facing Participant's County

	Statewide		Region 1	Region 2	Region 3	Region 4	Region 5	Region 6	Region 7
Issue/Concern	#	%	%	%	%	%	%	%	%
Don't know/not sure	806	35.2	27.4	27.0	32.3	47.0	40.4	45.7	42.6
Other	545	23.7	31.0	28.9	24.6	17.4	19.2	20.5	16.3
Need for facilities	211	9.2	8.2	10.7	9.5	7.0	10.0	9.4	9.3
Inadequate access	129	5.6	7.4	3.1	8.8	5.9	2.4	3.1	6.2
Lack of funding	127	5.6	6.3	3.6	3.9	4.5	10.0	4.7	8.5
None	111	4.8	4.9	5.5	3.5	4.9	4.6	5.5	7.0
Refused	90	3.9	4.7	5.0	2.5	4.2	3.0	5.5	3.1
Inappropriate behavior of enthusiasts	73	3.2	3.3	4.8	4.6	1.0	2.2	2.4	1.6
Poor facility conditions	71	3.1	2.5	2.6	2.8	4.2	3.5	2.4	3.1
Congestion/crowding	71	3.1	1.9	5.5	4.9	2.4	1.4		
Commercial use	44	1.9	2.2	2.6	1.4	1.4	2.4	0.8	1.6
Non-resident use	16	0.7	0.3	0.7	1.4		0.8		0.8
Total	2,294	100.0	100.1	100.0	100.2	99.9	99.9	100.0	100.1

Impact of Physical Disabilities on Recreational Activity

The final question in the BRFSS outdoor recreation module asked participants whether they had ever been prevented from participating in a recreational activity in Montana (in the last five years) because of a physical disability. Overall, 87.5% of participants said "No". There were two categories of "Yes" answers: 4.1% answered "Yes – but the disabled person was someone else" (spouse, child, etc.), and 4.1% answered "Yes – they had been prevented from participating because of their physical disability." Another 4.3% of respondents refused to answer the question, or weren't sure how to answer.

Table 3.12 shows the percentage of responses for each answer statewide and by FWP region. Regions 4 and 7 had the lowest percentage of people who were prevented from recreating because of a disability (less than 5%). The highest incidence of problems with disabilities occurred in regions 1, 2 and 6 (between 9.3% and 11.5%).

Table 3.12: BRFSS Survey Results 2002

Participants Prevented from Recreational Activity Due to Physical Disability

	Statewide		Region 1	Region 2	Region 3	Region 4	Region 5	Region 6	Region 7
	#	%	%	%	%	%	%	%	%
No	2007	87.5	83.3	86.8	89.5	91.6	87.8	83.6	91.5
Yes (respondent not the disabled)	94	4.1	4.4	6.2	3.7	2.4	4.3	1.6	3.1
Yes	93	4.1	7.1	3.1	3.7	2.4	3.3	7.8	1.6
Refused	71	3.1	3.6	3.1	2.3	2.4	3.0	6.3	2.3
Don't know/not sure	28	1.2	1.6	0.7	0.9	1.0	1.6	0.8	1.6
Total Yes Responses	187	8.2	11.5	9.3	7.4	4.8	7.6	9.4	4.7
Total Responses	2293	100.0	100.0	99.9	100.1	99.8	100.0	100.1	100.1

Context of BRFSS Data

The BRFSS survey data provide useful insights about Montanans' recreation habits and the demand for outdoor recreation facilities statewide and by FWP region. However, there are a number of unknowns (demand related to youth, responses to "Other" activities and facilities) that, if known, would provide a more complete picture. For this reason, the planning team also used data from the ITRR resident and nonresident studies detailed in the next sections, and data trends from Fish, Wildlife & Parks and Motor Vehicle Division in order to compare the outdoor recreation activities of Montanans and nonresident visitors.

3.4 ITRR Resident & Nonresident Recreation Study Results

Recreation Habits & Needs of Montanans

From July 1998 to June 1999, the University of Montana Institute for Tourism & Recreation Research (ITRR) conducted telephone interviews with more than 2,600 Montana resident households to study their recreation participation patterns. The study compared yearly, seasonal and monthly recreation participation; compared recreation participation by income level; by household type (with or without children); and it attempted to identify the value that Montana residents place on Montana's natural recreational assets.

Key findings of the survey were the following, as reported in the study's Executive Summary[1]:

- It was typical for only one person in the household to participate in most of the activities.
- Walking as a recreation activity was always the most participated in activity whether the household had children or not, no matter the season or month, and no difference between income levels.
- The seasons and months showed differences in recreation participation based on weather-related activities or regulation-related activities such as hunting. However, the top three activities in terms of participation (walking, recreational shopping and wildlife watching) were the same in winter, spring and summer. A difference occurred in the fall with sporting events entering the top three activities (Table 3.13).
- August was the busiest month with 30% of all households participating in 14 activities. January was the slowest month with 30% of the households participating in only 6 activities.
- Households with children were far more likely to participate in recreation activities than those without children. Only 6 activities were participated in by over 30% of households without children. In contrast, 14 activities were participated in by over 30% of households with children.
- Income was a large factor in recreation participation. With almost no exceptions, households earning over $50,000 annually participated with higher frequency in every type of recreational activity than families earning between $20,000 and $50,000 annually. Likewise, households earning between $20,000 and $50,000 participated at a higher frequency in virtually every activity than households earning less than $20,000 annually. Exceptions to this were ATV/off-road recreation, vehicle camping and gambling, which possess fairly constant levels of participation across all income levels.
- Montana residents are more active in non-natural resource dependent activities than those that require natural resources. In terms of number of households participating in the activities, nine of the non-resource dependent activities ranked in the top ten while only four of the natural resource dependent activities ranked in the top ten.
- **Conclusion**: Montana households with higher incomes and Montana households with children are more likely to be active in recreation activities. Only one highly participated in activity, wildlife watching, showed the uniqueness of Montana. Other activities, including walking, recreational shopping and attending sporting events can be participated in regardless of where one lives. The value of Montana's natural recreational resources is unclear since high participation in resource dependent activities is lower than other recreational activities.

Table 3.13

Overall Recreation Activity Participation of Montana Households 1998-99

Activity	%
Walking	75%
Recreational Shopping	53%
Wildlife Watching	52%
Attending Sporting Events	47%
Day Hiking	37%
Biking	35%
Attending Festivals	34%
Swimming	32%
Picnicking	31%
Attending Performances	29%
Participate in Sporting Events	29%
Nature Photography	29%
Visiting Museums	29%
Visiting Interpretive Centers	28%
Fishing (other than fly)	27%
Gambling	24%
Visting Art Galleries	24%
Motorcycling	22%
Visiting Native American Sites	19%
Hunting	18%
Camping - Tent	18%
Golfing	16%
Horseback Riding	15%
Visiting Attractions	14%
Fly Fishing	13%
Boating - Motorized	13%
Camping - Vehicle	13%
Backpacking	12%
Boating - Nonmotorized	11%
Sledding	11%
ATV/Off-road Recreation	10%
Downhill Skiing	10%
Snowmobiling	7%
Water Skiing	6%
Cross Country Skiing	5%
Ice Fishing	5%
Snowboarding	4%
Snowshoeing	2%

Source: ITRR Report 68

[1] ITRR Research Report 68, *Recreation Participation Patterns by Montana Residents*, Ellard, Nickerson, McMahon, September 1999

Overall, the study showed that the most popular outdoor recreation activities were walking, wildlife watching, attending sporting events, hiking, biking, attending festivals, swimming, picnicking, nature photography, fishing, motorcycling, hunting, camping, golfing, horseback riding and boating. Seasonally, the top twelve activities were as follows (all recreation activities included – outdoor and indoor):

Winter	Spring	Summer	Fall
1 Walking	1 Walking	1 Walking	1 Walking
2 Rec'l Shopping	2 Wildlife Watching	2 Wildlife Watching	2 Rec'l Shopping
3 Wildlife Watching	3 Rec'l Shopping	2 Rec'l Shopping	3 Attend Sport Event
4 Attend Sport Event	4 Biking	4 Picnicking	4 Wildlife Watching
5 Attend Performance	5 Picnicking	5 Swimming	5 Hunting
5 Day Hiking	5 Attend Sport Event	6 Biking	6 Hiking
5 Partic Sport Event	7 Hiking	6 Attend Sport Event	7 Attend Festivals
8 Attending Festivals	8 Swimming	8 Hiking	8 Attend Perform
9 Biking	9 Partic Sport Event	9 Attend Festivals	9 Nature Photog
10 Swimming	10 Fishing (other than fly)	10 Fishing (non-fly)	10 Visit Museums
10 Visiting Museums	10 Visit Museum/Fest	10 Visit Interp Centers	11 Biking
10 Visiting Art Galleries	10 Nature Photography	12 Visit Museums	11 Visit Interp Ctrs

It is interesting to note that, in winter, sledding ranked 14th, downhill skiing 17th, fishing (non-fly) 18th, snowmobiling 19th, and ATV/off-road recreation 28th on the list of 38 activities. In spring, top activities were dominated by passive recreation, with the addition of attending festivals 13th, visiting interpretive centers 14th, and attending performances 15th. In summer, motorized boating ranked 18th, nonmotorized boating 25th, fly fishing 26th, water skiing 29th, and ATV/off-road recreation 31st. In fall, fishing (non-fly) was 17th, tent camping 21st, fly fishing 22nd, horseback riding 23rd, vehicle camping 24th, and ATV/off-road recreation 28th.

Table 3.14 shows the percentage of households that participate in each of the activities by month. The highlighted figures indicate the peak month(s) for each activity. Among households with children, the top activities are walking, shopping, sporting events, wildlife watching, biking, swimming, hiking, picnicking, festivals and fishing. Among households without children, the top ranked activities are walking, wildlife watching, shopping, sporting events, hiking, festivals, nature photography, museums and performances.

The results of the ITRR study are similar to the BRFSS in that walking, wildlife viewing, hiking, biking, swimming and fishing are popular outdoor recreation activities among Montanans. These findings also are consistent with the survey of facility managers, who expressed needs for trails, parks and open space, swimming pools and fishing and boating facilities to fulfill recreation needs.

The next section discusses the outdoor recreation activities of nonresident visitors to Montana.

Table 3.14

% of Montana Households Participating by Month

Activity	J	F	M	A	M	J	J	A	S	O	N	D
Walking	73	80	80	81	75	75	76	75	79	78	64	70
Recreational Shopping	50	52	54	54	47	51	57	52	52	59	55	58
Wildlife Watching	53	53	55	52	56	54	59	53	46	55	43	47
Attend Sporting Events	49	58	39	42	39	42	38	47	52	57	47	50
Day Hiking	29	32	31	34	38	38	38	46	44	48	30	32
Biking	19	35	35	45	46	44	42	46	43	34	16	21
Attending Festivals	24	35	29	26	31	36	48	36	36	38	38	34
Swimming	20	26	31	24	41	49	56	47	32	18	16	24
Picnicking	7	15	26	29	44	57	55	59	35	24	13	9
Attend Performances	30	33	34	36	23	25	28	22	29	32	34	28
Particip in Sprtg Events	31	33	32	26	33	29	27	33	27	25	19	28
Nature Photography	22	25	23	26	30	30	34	36	30	36	24	26
Visiting Museums	17	26	33	26	30	32	36	32	34	28	26	23
Visiting Interp Centers	15	22	23	18	31	38	39	38	30	27	25	19
Fishing (other than fly)	21	18	18	18	31	39	36	38	30	24	20	19
Gambling	26	29	23	20	20	26	29	24	18	25	24	20
Visting Art Galleries	23	22	27	22	23	24	22	21	27	26	24	28
Motorcycling	21	26	24	18	20	21	26	17	22	27	22	21
Visit Native Am Sites	15	15	18	14	21	23	26	26	20	19	19	11
Hunting	14	12	10	11	8	5	8	10	26	41	38	25
Camping - Tent	3	10	6	17	27	24	31	30	23	18	14	7
Golfing	3	11	18	28	27	21	24	23	22	13	7	3
Horseback Riding	15	12	16	14	18	17	15	18	19	15	15	10
Visiting Attractions	7	10	11	14	16	19	27	24	16	13	7	7
Fly Fishing	6	8	9	15	14	19	17	22	14	19	11	5
Boating - Motorized	3	3	6	6	15	24	27	29	18	11	4	5
Camping - Vehicle	4	8	8	14	14	19	21	23	15	18	10	7
Backpacking	7	10	10	5	14	15	14	16	14	14	13	7
Boating - Nonmot	3	4	3	4	15	17	27	20	12	8	5	4
Sledding	27	24	11	3	4	1	2	0	0	7	18	33
ATV/Off-road Rec'n	4	9	12	13	10	13	10	12	10	10	9	6
Downhill Skiing	24	24	15	15	3	1	1	1	0	3	9	22
Snowmobiling	18	17	11	7	3	1	1	1	1	1	8	16
Water Skiing	1	1	4	2	3	12	16	20	9	3	1	3
Cross Country Skiing	8	9	5	5	3	0	0	1	2	4	5	11
Ice Fishing	19	11	7	3	3	0	0	0	2	2	4	12
Snowboarding	11	12	5	6	2	0	0	0	0	2	3	9
Snowshoeing	3	5	4	0	1	0	0	0	0	1	4	5

Highlights indicate highest months for each activity. Source: ITRR Report 68

Table 3.15

MT Nonresident Traveler Activities

Activity	# Visitors	%
Shopping	3,606,030	18.6
Wildlife watching	2,697,678	13.9
Day Hiking	2,401,564	12.4
Picnicking	1,954,901	10.1
Camping (devlp)	1,632,460	8.4
Fishing	1,208,550	6.2
Nature Study	847,366	4.4
Gambling	785,264	4.1
Camping (undevlp	704,911	3.6
Golfing	478,241	2.5
Rafting/Floating	425,728	2.2
Sporting Event	345,092	1.8
Backpacking	296,796	1.5
Off highway/ATV	256,730	1.3
Motor Boating	246,909	1.3
Downhill Skiing	242,262	1.3
Hunting	217,458	1.1
Mtn Biking	215,629	1.1
Road/Tour Biking	213,056	1.1
Canoe/Kayaking	181,445	0.9
Snowmobiling	115,425	0.6
XC Skiing	69,125	0.4
Water-skiing	68,090	0.4
Snowboarding	57,712	0.3
Snowshoeing	57,712	0.3
Ice Fishing	19,237	0.1
	19,345,372	100.0

Source: ITRR 2000-2001 Traveler Study

The appeal of shopping, historic/cultural attractions and events provides clues to potential partnerships and value-added services that could be provided by outdoor recreation facilities to capture more revenue from nonresident visitors.

Recreation Habits & Needs of Nonresident Visitors

From December 2000 through November 2001, ITRR conducted a statewide study of nonresident visitors to Montana. During the twelve month period, 4,220 questionnaires were completed, and used to generate seasonal reports for winter (Dec-Mar), spring (Apr-May), summer (Jun-Sep) and fall (Oct-Nov). Table 3.15 summarizes the overall rankings of nonresident visitor activities year-round. The following is a summary of most popular activities by season.

In winter, primary activities were shopping (41%), wildlife viewing (17%), downhill skiing, day hiking and gambling (12% each). Interest in historic and cultural activities increased from a 1998 study. Less than 15% of winter visitors toured major outdoor attractions (Yellowstone, Glacier, Little Bighorn, Flathead Lake). Skier visits statewide declined from 1998 to 2001, but visits at Big Sky rose 6.5%, and the number of snowmobilers in Yellowstone Park rose 14% during that time period.

In spring, the most frequent activities were shopping (27%), visiting historic sites (22%), camping, hiking, wildlife viewing and picnicking (10-15% each). About one quarter of spring visitors toured Yellowstone Park, while 19% stopped at Glacier and Little Bighorn.

In summer, about one-third of visitors enjoyed shopping, wildlife viewing and hiking, while one-in-four enjoyed picnicking, visiting historic sites and camping. About twenty percent visited museums, went fishing and visited Lewis & Clark and American Indian sites. Fewer than 10% of nonresident visitors participated in gambling, golf or rafting. Nearly half visited Yellowstone Park, one-third visited Glacier, 14% visited Little Bighorn and 7% stopped at the Lewis & Clark Interpretive Center in Great Falls.

In fall, visitors enjoyed shopping (34%), wildlife watching (22%), hunting (17%), hiking (16%) and fishing (13%). Nearly half (43%) of all destination vacationers in the fall were hunters, and 15% hired one of Montana's licensed outfitters to guide them.

The above information clearly shows that Montana's nonresident visitors enjoy the same outdoor recreation activities as Montana residents, both seasonally and year-round. The appeal of shopping, historic/cultural attractions and events provides clues to potential partnerships and value-added services that could be provided by outdoor recreation facilities to capture more revenue from nonresident visitors.

Montana's Tourism Strategic Plan for 2003-2007 identifies high-value, low-impact visitors as primary target customer segments. These visitors are willing to pay for high quality recreation experiences, and Montana's recreation facility managers need to provide more opportunities for visitors to spend money to support enhanced facilities and services.

3.5 Comparison of BRFSS and ITRR Survey Results and Recreation Trends

Table 3.16 below compares the results of the most popular activities from the BRFSS and ITRR resident and nonresident studies. Key similarities include walking and hiking, wildlife-related activities (viewing, fishing, hunting), swimming, golf, picnicking, biking, boating and camping. Differences appear primarily because the ITRR studies included indoor and outdoor recreation activities, while the BRFSS study focused only on outdoor activities. Other key themes are educational and interpretive activities (learning, historic sites, nature study) and shopping, events and performances. The needs identified by outdoor recreation facility managers parallel the results of the demand data revealed by the BRFSS and ITRR studies. Therefore, the consistency of activity participation provides guidance to facility managers about ways to prioritize needs.

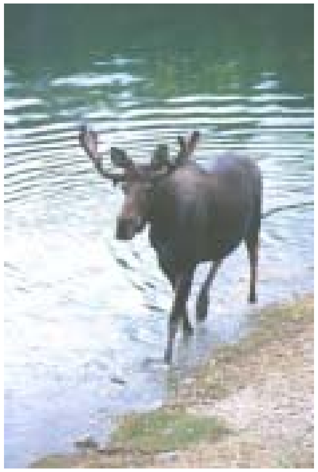


Table 3.16

2002 BRFSS Primary Activity Results

Activity	#	%
Walking	445	19.4
Other activity	399	17.4
Fishing	156	6.8
Hunting	154	6.7
Golf	103	4.5
Camping	82	3.6
Horseback riding	74	3.2
Mountain biking	61	2.7
Bicycling - street	59	2.6
Basketball	51	2.2
Downhill skiing/snowboarding	47	2.0
Don't know/not sure	43	1.9
Backpacking	41	1.8
Swimming	41	1.8
Jogging	40	1.7
Boating-motorized	32	1.4

1999 Montanans' Recreational Activities

Activity	%
Walking	75
Recreational Shopping	53
Wildlife Watching	52
Attending Sporting Events	47
Day Hiking	37
Biking	35
Attending Festivals	34
Swimming	32
Picnicking	31
Attending Performances	29
Participate in Sporting Events	29
Nature Photography	29
Visiting Museums	29

Source: ITRR Report 68

2001 Nonresidents' Activities

Activity	%
Shopping	18.6
Wildlife watching	13.9
Day Hiking	12.4
Picnicking	10.1
Camping (devlp)	8.4
Fishing	6.2
Nature Study	4.4
Gambling	4.1
Camping (undevlp)	3.6
Golfing	2.5
Rafting/Floating	2.2
Sporting Event	1.8
Backpacking	1.5
Off highway/ATV	1.3
Motor Boating	1.3
Downhill Skiing	1.3
Hunting	1.1

Source: ITRR 2002-2001 Traveler Study

Table 3.17

U.S. Recreation Participation by Activity Type

Individual trail/street/road activities	87%
Traditional social activities**	80%
Viewing & photographing activities	69%
Viewing & learning activities	67%
Driving for pleasure activities	61%
Swimming activities	60%
Outdoor adventure activities	52%
Boating/floating/sailing activities	36%
Fishing	33%
Snow & ice activities	24%
Outdoor team sports	23%
Hunting	11%

Most "Popular" Individual Activities

	% of Pop'n
Walking	82%
Family gathering*	73%
Visiting a nature center, trail or zoo	56%
Picnicking	56%
Viewing natural scenery	55%
Driving for pleasure thru natural scenery	53%
Sightseeing	52%
Viewing wildflowers & natural vegetation	45%
Visiting an Historic Site	45%
Swimming/Lake, River, Ocean	43%
Viewing wildlife (other than birds)	43%
Bicycling	39%
Visiting a beach	37%
Visiting a wilderness or primitive area	33%
Bird-watching	33%
Hiking	32%
Freshwater fishing	29%

Source: 1999-2000 National Survey on Recreation & the Environment, USDA Forest Service & Univ. of TN, Knoxville
* Such as picnicking, family gatherings, reunions

3.6 National Recreation Trends

The planning team reviewed a number of national recreation and tourism studies and compared the results with the Montana research. Overall, the BRFSS and online survey findings were consistent with national trends. As in Montana, national results from the 1999-2000 National Survey on Recreation & the Environment reveal that top outdoor recreation activities are walking and hiking, nature/wildlife viewing, swimming, picnicking, biking, boating and fishing (Table 3.17).

Other popular activities include driving, visiting historic sites and beaches, and learning activities. Most of the top ranked activities are passive, although 52% of Americans reported participation in outdoor adventure activities (primarily soft adventure such as biking, skiing, snorkeling and horseback riding). Social activities (family gatherings and reunions) are important to 70-80% of all respondents.

These findings are consistent as well with national tourism trends. The Tourism Industry Association of America (TIA) and America Outdoors (AO) recently completed tourism research studies which are summarized by the following trends (see Montana Tourism Strategic Plan 2003-2007, Chapter 3, for details):

1. The Time Crunch Affects Travel Planning
2. Women Make the Decisions
3. Mature Travelers Rule
4. Family Values are Back (Families are Blended & Multi-Generational)
5. History & Culture are the #1 Attraction
6. Festivals Attract One-Fifth of All Travelers, esp. Young Families
7. Rural Places are Appealing
8. Packaged Niche Products are a Key to Success
9. Business Travelers Deserve More Attention
10. Non-Business Meetings & Conventions are Big Business
11. Canadians are Returning
12. Europeans Spend Five Times More Time & Money
13. Adventure and Geo-Tourists are Large Markets
14. Sportsmen Numbers Remain Steady, More Women Join the Club
15. Tourists Shop 'Til They Drop

Recreation facility managers can benefit from strategic action that exploits tourism trends and high-value visitors to Montana by generating revenue from nonresident visitors that will help them manage and maintain their facilities both for residents and nonresidents.

3.7 Summary and Implications

As Montana's population and the number of nonresident visitors have grown, there is greater demand on facilities and managers. Tourism is an important component of Montana's economy, and it creates a significant demand for outdoor recreation facilities. Moreover, the highest demand activities parallel the facility types with greatest needs as described in Chapter 2 (although swimming was not included in the ITRR nonresident or NSRE studies).

Montana citizens are aging, and wages are low, so accessibility and affordability are important facets of outdoor recreation planning. State and regional tourism efforts are directed at attracting higher value, lower impact nonresident visitors to maximize tourism revenues while minimizing the impact of tourism on Montanans. Montana resident and nonresident recreationists participate in generally the same outdoor activities, which are walking, hiking, biking, swimming, wildlife viewing, fishing, hunting and picnicking. Demand for both motorized and non-motorized recreation access will continue to increase; therefore, facilities will need to be provided to address this demand effectively, while managing Montana's natural and cultural assets sustainably.

National and state data indicate that these trends will continue, with particular emphasis on activities preferred by mature citizens (walking, golf, fishing, bird/wildlife viewing, boating, learning, sightseeing) and youth, as families and extended families seek to reconnect and establish stronger family ties through recreation activities. Hard adventure activities are undertaken by a much smaller segment of the population (whitewater rafting, rock and ice climbing, skydiving, hang gliding, etc.), and therefore it is likely that fewer public resources will be dedicated to providing facilities for them.

This chapter and the previous one compared the demand for outdoor recreation in Montana with the supply of outdoor recreation facilities, along with facility needs. As demand for outdoor recreation increases, the need for enhanced facilities and services increases, raising issues of funding, management, maintenance and prioritization. Montana's struggling economy and percentage of low income residents present challenges that must be addressed strategically.

The supply and demand analysis provided the planning team with information to identify gaps between supply and demand, and key issues related to outdoor recreation management and facilities. The most critical issues are identified in the next chapter, as well as issues related to the Land & Water Conservation Fund program. From the issues, the planning team developed outdoor recreation goals, objectives and actions, which are detailed in Chapter 5.

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